

## **Step 3: Assessing my Worksite**

Your worksite assessment should contain two main components:

- Part 1: An assessment of the current worksite environment and policies, and
- Part 2: An employee survey and/or other means for employee input to identify interests and the types of programming that will be used.

### **How to Assess the Worksite Wellness Environment?**

#### **Why do an assessment?**

The purpose of completing the assessment is to identify your worksite's strengths and areas in need of improvement. The assessment will lead your workgroup to recommend actions for changes to make the worksite more supportive of healthy behaviors (i.e. healthy food choices in vending machines, policies to enforce no smoking on worksite grounds or encouraging walking during break times). You may find some of the actions for supporting healthy behaviors are easy to do and others may not be feasible or efficient in your worksite. The assessment results can also be used as a baseline measure for evaluation. The initial assessment can later be compared with a follow-up assessment several months later to note progress.

#### **Who should do the assessment?**

Identify a workgroup (at least 4-5 people) who will be responsible for completing the assessment. This may be a subset of your wellness workgroup. Forming a diverse group from all areas and levels of your organization is important for meaningful assessment and successful planning and implementation. Suggested participants include: human resources, employees from various departments, administrators, supervisors, employee or wellness staff.

#### **When should the assessment be done?**

Use the assessment as a starting point for your wellness initiative. Once you have completed the assessment, determine which areas the workgroup will focus on (i.e. healthy eating, physical activity, general health, etc.). Establish a time for the workgroup to meet and monitor the progress. Also determine a schedule for annual assessments, so that the assessment can serve as a tool for continuous improvement and accountability over time.

#### **Where can I get HELP?**

You may be able to complete the assessment checklist and employee survey without any help. Both documents are ready to use, but if you would like more detail, or want to tailor the assessment more to your worksite, you can contact Jon Morgan at (608) 266-9781 or [morgajg@dhfs.state.wi.us](mailto:morgajg@dhfs.state.wi.us).

#### **What do I need?**

- ❖ An assessment workgroup
- ❖ The worksite assessment tool
- ❖ The employee survey tool
- ❖ Some time
- ❖ Someone to collate the results

## Part 1: Worksite Wellness Assessment Checklist

Complete the Worksite Wellness Assessment Checklist to determine what wellness components you currently have at your worksite. This can be done with the full workgroup or you may want a few key personnel (such as the Human Resources lead, Wellness Coordinator or Workgroup Coordinator) to do a preliminary scan based on information they gather and then let the full workgroup react to their findings.

**A sample of an abridged completed checklist can be found on the next page.**

**A full version of the checklist can be found in Appendix B.**

Completion of the checklist provides a reference point of the wellness functions that are currently in place or in process and it provides an overview of some of the items that should be considered for a comprehensive Wellness Program.

### CHECKLIST COMPONENTS:

- 1 **Categories.** There are six major categories (General, Physical Activity, Nutrition, Health Screening, Tobacco Use and Emergency Response Plan). Each category has several questions that address what you currently have in place at your worksite.

- 2 **Current Status.** Initially, list whether you have the component (Yes), are in the process of instituting the component or you are planning for the component (In Process) or don't have the component at all (No). At the end of each category, sub-total the number in each column and then total all of the categories at the end of the checklist to get an overview of where your worksite wellness program currently rates (A sample can be found on the next page). You should also use this baseline measure as a benchmark for later evaluation. By evaluating where your worksite is on each wellness component, you will be able to get a general idea of your status across each category and all 57 items.

- 3 **Potential Priorities.** After you have completed the assessment and the employee interest survey, you can use the *potential priority* column to indicate what components you might want to focus on that are either currently in process or don't exist. This can serve as a first screening of possible areas to focus on as you develop your action plan, which is described in Step Five.

Example:

#	Wellness Component	Yes	In Process	No	Potential Priority
<b>General</b>					
1	Does the worksite have a current policy outlining the requirements and functions of a comprehensive worksite wellness program?		✓		✓

## Worksite Assessment Checklist (Completed sample)

#	Wellness Component	Yes	In Process	No	Potential Priority
<b>General</b>					
1	Does the worksite have a current policy outlining the requirements and functions of a comprehensive worksite wellness program?		✓		✓
2	Does the worksite have a representative committee that meets at least once a month to oversee worksite wellness programs?		✓		
3	Does the worksite have a worksite wellness plan in place that addresses the purpose, nature, duration, resources required, participants involved, and expected results of a worksite wellness program?		✓		✓
4	Does your new employee orientation include an explanation of worksite wellness programs and are new employees given copies of any physical activity, nutrition, and tobacco use policies?			✓	
5	Does the worksite promote and encourage employee participation in its physical activity/fitness and nutrition education/weight management programs? Examples of ways to “promote and encourage employee participation” include:			✓	
6	Does the worksite offer or provide adequate healthcare coverage for employees and their families for prevention of and rehabilitation of chronic disease?	✓			
7	Is there a worksite budget for employee health promotion that includes some funds for programming and/or a portion of a salary for a coordinator?		✓		
<b>General area totals (# of Yes, In Process and No items)</b>		<b>1</b>	<b>4</b>	<b>2</b>	

<b>FULL WORKSITE SCORECARD (Sample)</b> (Totals for all categories)	Yes	In Process	No
<b>General (10)</b>	<b>2</b>	<b>6</b>	<b>2</b>
<b>Physical Activity (20)</b>	<b>5</b>	<b>4</b>	<b>11</b>
<b>Nutrition (19)</b>	<b>6</b>	<b>5</b>	<b>8</b>
<b>Health Screening and Disease Prevention (2)</b>			<b>2</b>
<b>Tobacco Use (7)</b>	<b>2</b>	<b>1</b>	<b>4</b>
<b>Cardiac Emergency Response Plan (2)</b>		<b>1</b>	<b>1</b>
<b>Worksite Total (60)</b>	<b>15</b>	<b>17</b>	<b>28</b>

## Part 2: How to Get Employee Input

### Why would we want to do an employee survey?

You should conduct an employee survey to get a better understanding of your target audience (your company's employees) and get an initial idea of their current health habits and interest areas. The survey can be tailored to your worksite and can be done in paper form or through the use of survey instruments on the internet or that can be purchased. Using a computer survey instrument has the added advantage of being able to collect and analyze data automatically. There are software packages available for under \$100 to collect basic information.

As was the case with the worksite environmental assessment, the employee survey results can also be used as a baseline measure for later evaluation. The initial survey results can later be compared with a follow-up survey several months later to note progress.

You should also consider engaging employees in focus groups or informal interviews to gather information on their wants and needs. This can be done either before or after the survey, or if you don't have the resources to survey employees, you could use this method to gather information in place of the survey.

Whatever method you use to gather information, make it as easy as possible for employees to complete and submit the information so you get a high return rate. Consider offering an incentive or prize for people who complete the survey.

Listed on the next page are sample results of questions answered as part of a survey and how you might use the information. The full sample survey can be found in Appendix C. You should modify the survey however you want to meet your needs.

Other sample surveys can be found at:

1. Healthy Workforce 2010: Essential Health Promotion Sourcebook for Employers, Large and Small (pages 62-64)  
[http://www.rogerslowell.com/drugfree/Healthy\\_Workforce\\_2010.pdf](http://www.rogerslowell.com/drugfree/Healthy_Workforce_2010.pdf)
2. Take Action CA Worksite Evaluation  
<http://www.takeactionca.com/docs/Evaluation.pdf>

## Employee Habits & Interest Survey (completed sample)

<b>Wellness Questions</b>
1. Current physical activity level.
<p><b>12%</b> I don't exercise or walk regularly now, and I don't plan to start in the near future.</p> <p><b>29%</b> I don't exercise or walk regularly, but I've been thinking about starting.</p> <p><b>36%</b> I'm doing moderate or vigorous physical activities for at least 30 minutes on some days, but fewer than 5 days a week.</p> <p><b>11%</b> I've been doing moderate or vigorous physical activities for at least 30 minutes in a day, on five or more days a week, and have been doing it for the last 1 to 6 months.</p> <p><b>12%</b> I've been doing moderate or vigorous physical activities for at least 30 minutes in a day, on five or more days a week, and have been doing it for 7 months or longer.</p>
2. When do you get most of your physical activity each day?
<p><b>9%</b> Before work</p> <p><b>20%</b> During work hours on break and lunch times</p> <p><b>66%</b> After work</p> <p><b>6%</b> None of the above. I am not physically active or am only active on weekends.</p>
<b>Demographics</b>
15. Gender
<p><input type="radio"/> <b>28%</b> Male</p> <p><input type="radio"/> <b>72%</b> Female</p>
16. Age
<p><input type="radio"/> <b>0%</b> &lt;20</p> <p><input type="radio"/> <b>6%</b> 20-29</p> <p><input type="radio"/> <b>16%</b> 30-39</p> <p><input type="radio"/> <b>26%</b> 40-49</p> <p><input type="radio"/> <b>45%</b> 50-59</p> <p><input type="radio"/> <b>7%</b> 60+</p>

Sample

(A blank Employee Survey can be found in Appendix C)

### What can you do with this data? – Some examples.

The activity information from Question #1 shows that 41% of employees are not active at all and that an additional 36% are not active at least five times per week. This suggests that any physical activity program proposed will have to start out slowly to engage participants at a relatively low level and build their stamina.

The demographic information in question 15 & 16 shows a largely female work force (72%), and an older work force with 78% over age 40 and 52% over age 50. This should greatly influence the type and intensity of any physical activity programming you might do that would have mass appeal.